



Strategic Planning

The future of your organization

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What is it and why does it matter?

- Strategic Planning- What is it?
- Why would you do it?
- How will you do it?
- Who will be doing it?
- Timeframe (when will you be doing it?)
- How will you monitor it?

What is it?

- It is deciding where you want to be as an organization, what you need to do to get there, and how you will take those steps.
- It looks at what might keep you from getting there and addresses it.

Want a more detailed description? Go to last two pages of this document.



Don't run your organization this way.

Why do it?

- Strategic planning will help you decide what you want your organization to look like over time; it will help set goals.
- It will require you to identify the stakeholders in your organization.
- It will help ensure that the activities you engage in will always be tied to your mission and organizational goals.

How to do it - the steps

- Establish mission, vision, goals
- Analyze internal and external environments
 - Conduct a SWOT analysis (strengths, weaknesses, opportunities, threats)
- Define strategy
- Implement strategy
- Exercise Strategic Control

Make sure everything is Specific, Measurable, Achievable, Relevant, and Timely.

Who will be involved?

- Leadership team
- Key members of management
- Representatives from service areas
- Representative from your clients (optional)
- A committee of board members



Timeframe

- Committee will be created.
- Beginning strategy meeting will be held with a consultant in a ½ day format.
- The committee will meet twice per month for up to six months, at which time the plan will be presented to the board.
 - As the board of directors is responsible for the strategic direction and financial well-being of the organization, they will be integrally involved in all phases of planning.

A working tool

- This is meant to be a working strategic plan.
 - Not a plan to be shelved and never used again
- Activities going forward will be evaluated through the lens of the strategic plan, to ensure the organization is always moving toward fulfillment of its mission and is serving clients in the best way possible.



Addendum:
A more complete description
of a Strategic Plan

What is strategic planning?

“Strategic planning is an organizational management activity that is used to set priorities, focus energy and resources, strengthen operations, ensure that employees and other stakeholders are working toward common goals, establish agreement around intended outcomes/results, and assess and adjust the organization's direction in response to a changing environment...

The Basics of Strategic Planning and Strategic Management. (n.d.). Retrieved August 9, 2013, from <http://www.balancedscorecard.org/BSCResources/StrategicPlanningBasics/tabid/459/Default.aspx>

What is strategic planning?

...It is a disciplined effort that produces fundamental decisions and actions that shape and guide what an organization is, who it serves, what it does, and why it does it, with a focus on the future. Effective strategic planning articulates not only where an organization is going and the actions needed to make progress, but also **how it will know if it is successful.**"

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